

SURVIVING SPOUSE CHECKLIST FOR A MILITARY VETERAN

Consolidated from MOAA, VA, DFAS, Social Security, and Survivor Assistance Resources

IMMEDIATE ACTIONS – FIRST 24–48 HOURS

Important Documents

Locate will, DD Form 214, marriage certificate, insurance policies, military retirement records, bank/investment account information, and Social Security/account numbers.

Notifications

- Obtain legal pronouncement of death.
- Notify immediate family, friends, and employer (if applicable).
- Contact clergy/spiritual advisor (if desired).
- Contact funeral home and begin arrangements.
- Prepare and publish obituary (optional).

Military & Government Notifications

Organization	Contact Information
Army Casualty Assistance	(888) 276-9472 (Opt 4)
Marine Corps Casualty Assistance	(800) 847-1597
Navy Casualty Assistance	(800) 368-3202
Air Force / Space Force Casualty Assistance	(800) 525-0102 (Opt 2, then 1)
Coast Guard Casualty Assistance	(571) 266-2375
VA Office of Survivors Assistance	(800) 827-1000
MOAA Survivor Assistance	(800) 234-6622 • msc@moaa.org

NEXT STEPS – FIRST FEW DAYS TO 2 WEEKS

Death Certificates

Order 10–15 certified copies of the death certificate.

Financial Matters

- Keep joint bank accounts open until recurring deposits/payments are identified.
- Report death to DFAS and stop retired pay: (800) 321-1080.

Initiate Survivor Benefit Plan (SBP) annuity payments, if applicable.

Notify life insurance companies and begin claims processing.

Federal Benefits

Notify Social Security Administration (SSA): (800) 772-1213.

Contact VA regarding survivor benefits:

- Dependency and Indemnity Compensation (DIC)
- Burial Benefits
- Survivor Pension
- Accrued Benefits
- Education Benefits (if eligible)

VA: (800) 827-1000

Submit VA Form 21-0966 (Intent to File).

Medical Benefits

Update DEERS records.

Review and update TRICARE eligibility: (800) 538-9552.

Claims Assistance

Gather military, medical, and financial records.

Contact a Veterans Service Organization (DAV, VFW, American Legion, or County Veterans Service Office).

Identity Protection

Contact major credit bureaus and request a deceased alert or credit freeze.

ONGOING TASKS – FIRST SEVERAL MONTHS

Financial Review

Review monthly bills and automatic payments.

Update ownership and beneficiary information.

Review deeds, vehicle titles, investment accounts, retirement accounts, and safe deposit boxes.

Accounts & Memberships

- Notify banks, credit unions, and financial institutions.
- Close or memorialize email accounts, social media accounts, subscriptions, and memberships.

Fraud Prevention

- Monitor credit reports regularly.
- Watch for unauthorized activity or identity theft.

Emotional Support

- Seek grief counseling and support through:
 - VA Vet Centers
 - TAPS
 - Military OneSource
 - Local faith communities
 - Community grief support groups

IMPORTANT REMINDER

This checklist is intended as a general guide for surviving spouses and family members of military veterans. Always verify current benefit eligibility, forms, phone numbers, and procedures directly with official agencies before taking action.

Date Prepared: _____

Veteran Name: _____

Surviving Spouse/Family Member: _____